

CANSO ATM Traffic Analysis Report

7 December 2020

Global air traffic volumes largely flat for past four months

- 2.14 million flights operated globally in November 2020, a decline of 35% from the 3.27 million that flew in November 2019. Average daily flight levels trended slightly downward during the month, with an average of 69,300 flights operating daily at the end of November.
- November 2020 saw 4.51 million flight hours operated globally, down 33% from the 6.69 million flight hours flown in November 2019. Average daily flight hours at the end of November were 148,400 hours daily, down 34% from 224,200 hours daily at the same point in 2019.
- In comparison to the month previous, November 2020 had 140,000 fewer global flights and 243,000 fewer global flight hours than in October 2020.

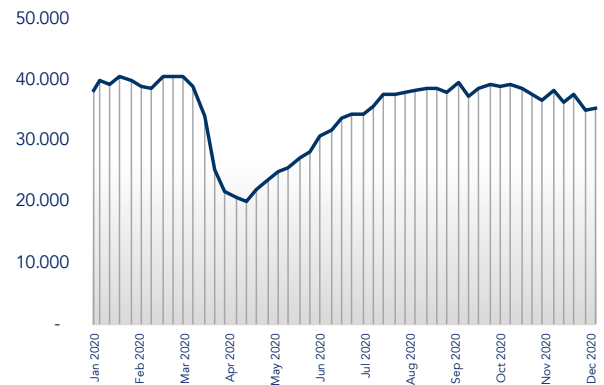
Flat global traffic volumes mask weakening in particular regions

In the past few months increasing COVID-19 infection rates in several countries have negatively affected air travel, stalling continued recovery of traffic volumes. Global daily average traffic volumes have largely ranged between 70,000 and 74,000 flights since mid-July.

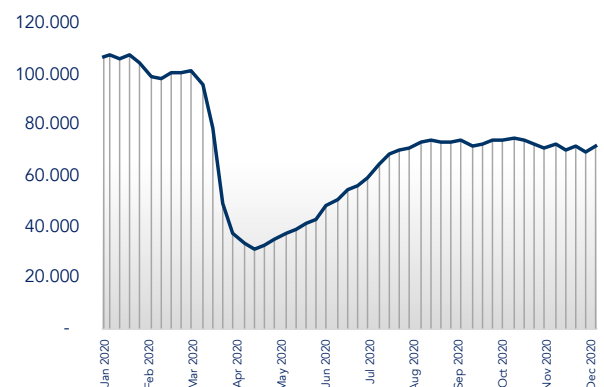
The number of unique aircraft operating daily is trending downwards as some airlines withdraw capacity and again park a portion of their fleet. At the end of November an average of 35,200 unique aircraft were operating daily. That is down 2,900 aircraft from the number that were operating at the end of August.

The pandemic low point for global air traffic remains mid-April. Recovery seen in May, June and July began to flatten in August. However, recovery has been uneven across regions of the globe, with some regions seeing material declines in volumes in the past few months, while others experience a continued slow recovery of flight numbers.

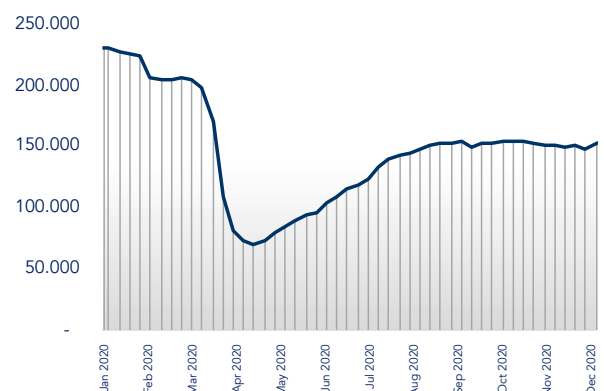
Average unique aircraft



Average global flights

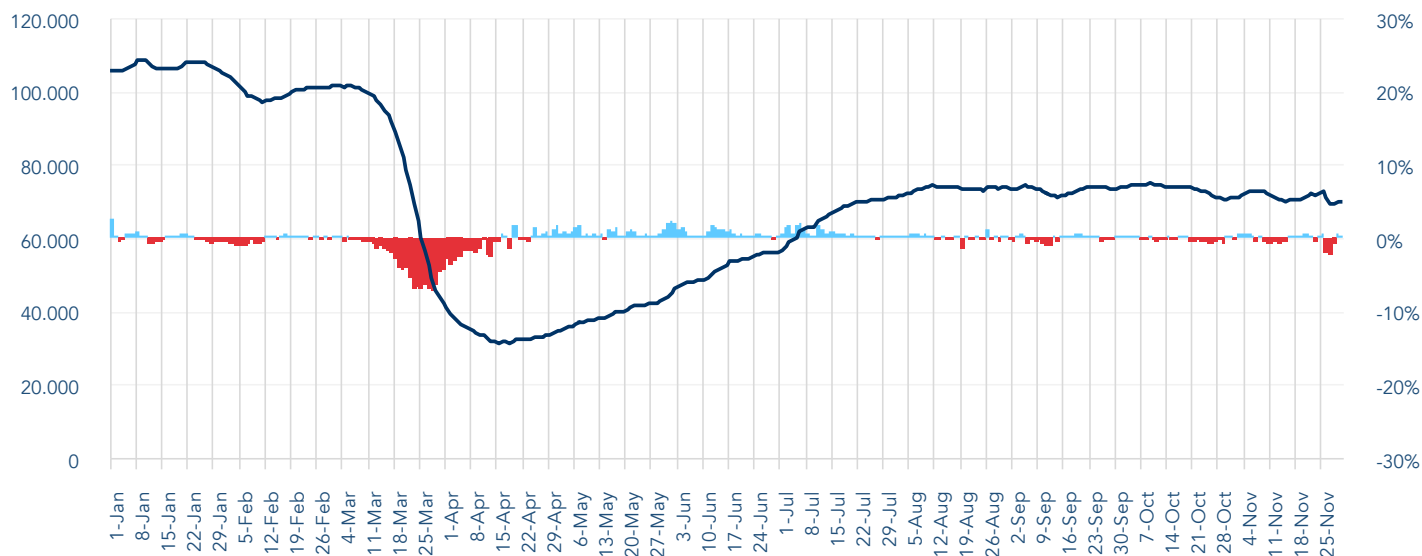


Average global flight hours



Global daily flights variation

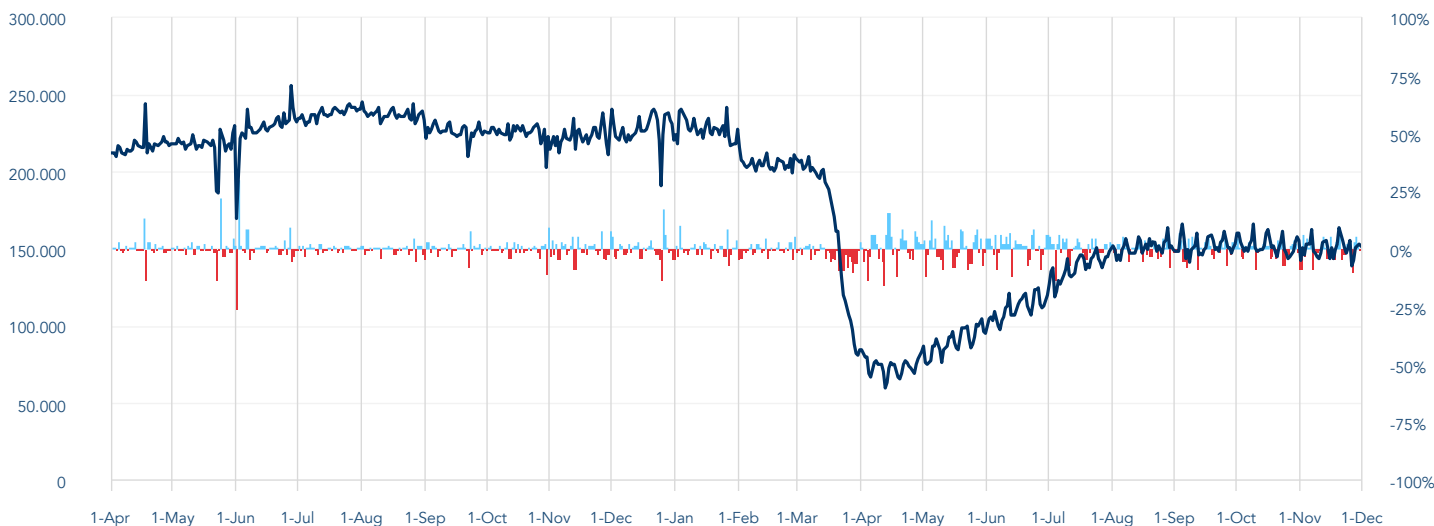
Rolling 7-day average of daily flights



The rolling 7 day average of global daily flight volumes has shown little variability in the past months, but ended November just under 70,000 flights per day, 34 % lower than daily volumes at the beginning of 2020.

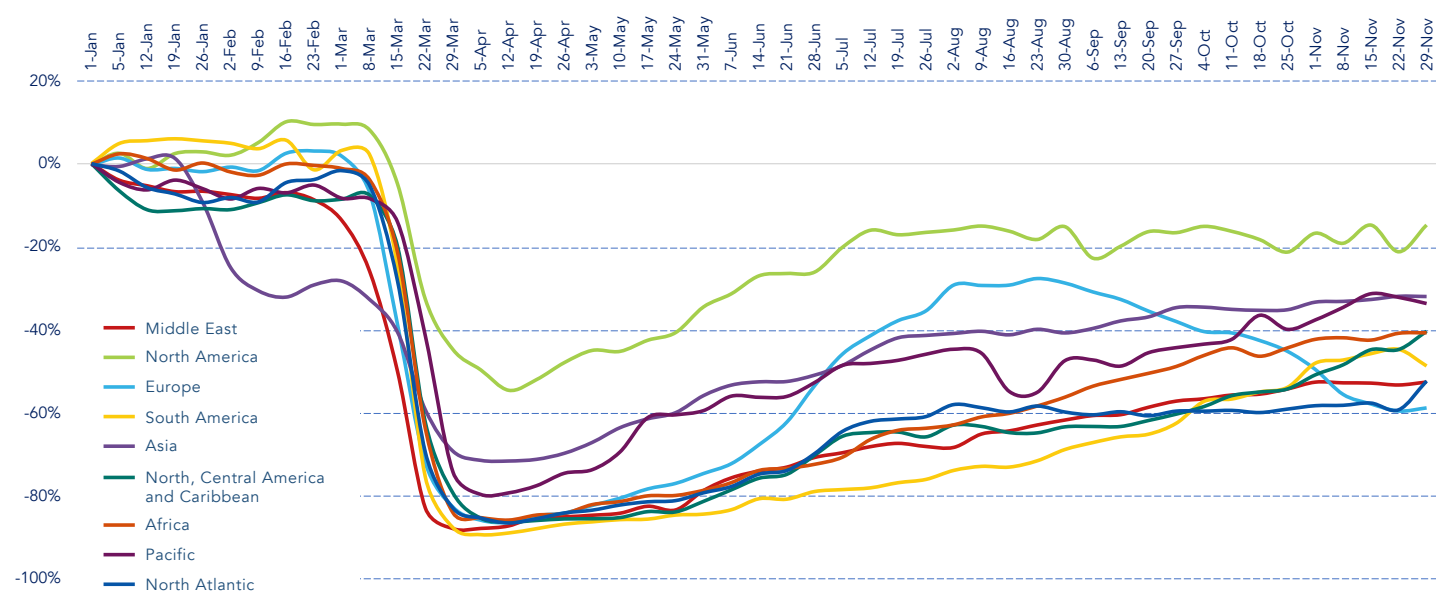
Daily flight hours

Flight hours since April 2019 with percentage of day-to-day variability



Daily flight hours, an important metric of ATM workload, exceeded 166,000 hours globally on 4 September, and again on 9 October 2020. Friday 20th November was the busiest traffic day of the month with 163,900 flight hours.

Percent change in movements by region



With traffic volumes in North America and the North Atlantic remaining largely flat throughout the autumn, and most other regions showing sustained growth to varying extents, Europe showed a continuation of declining traffic volumes that began in August. Traffic volumes in Europe declined to an average of only 10,300 flights daily at the end of November. By the end of the month the region became the most severely impacted at -59% of flight numbers seen at the beginning of the year. In flight hours, Europe saw a decline of 55%, exceeded only by a decline of 56% in flight hours in the North Atlantic as a result of the decline of long haul trans-Atlantic flights. The most significant growth was seen in the Caribbean, where 900 additional daily flights were added between late October and late November.

Average daily flight hours and average daily movements by region

	Dates	Average daily flight hours	Percent change	Average daily movements	Percent change
Middle East	01 Jan 2020 29 Nov 2020	7,400 4,700	36%	6,100 2,900	52%
North America	01 Jan 2020 29 Nov 2020	67,400 58,900	13%	38,000 32,500	14%
Europe	01 Jan 2020 29 Nov 2020	44,700 19,900	55%	24,900 10,300	59%
South America	01 Jan 2020 29 Nov 2020	10,700 5,300	50%	5,800 3,000	48%
Asia	01 Jan 2020 29 Nov 2020	74,900 50,400	33%	35,000 23,900	32%
Caribbean	01 Jan 2020 29 Nov 2020	9,100 5,200	43%	6,400 3,800	41%
Africa	01 Jan 2020 29 Nov 2020	4,200 3,800	10%	1,800 1,100	39%
North Atlantic	01 Jan 2020 29 Nov 2020	6,800 3,000	56%	2,300 1,100	52%

About the ATM report

The ATM Report is issued bi-weekly by CANSO as an analysis of metrics directly relevant to the ATM industry. The report uses high fidelity global space-based ADS-B air traffic data provided via a partnership with Aireon. The data includes surveillance of all 1090Mhz ADS-B Equipped aircraft. While some non-ADS-B equipped aircraft may not be included, the data is appropriate for the monitoring of global trends in traffic levels.

About CANSO



The Civil Air Navigation Services Organisation (CANSO) is the global voice of air traffic management. CANSO Members support almost 90 percent of world air traffic and represent leading providers of technology and services to the industry. Members share information and develop new policies, with the ultimate aim of improving air navigation services. For more, visit canso.org.

About Aireon



Aireon is harnessing next-generation aviation surveillance technologies that were formerly ground-based and, for the first time ever, is extending their reach globally through the use of satellite technology to significantly improve efficiency, enhance safety, reduce emissions and provide cost savings benefits to all stakeholders. For more information, please visit aireon.com.

